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Chicken at the center of the plate

Who is eating what and why

Experts in what consumers want and why



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Who we are

As a market intelligence agency, our understanding of consumers, innovation and global markets gives our clients the clarity to act and the confidence to lead.

With over 50 years of expertise and millions of data points, we fuse the real-world understanding of Mintel's experts with cutting-edge technology to uncover patterns and predict the future.

Next starts here.



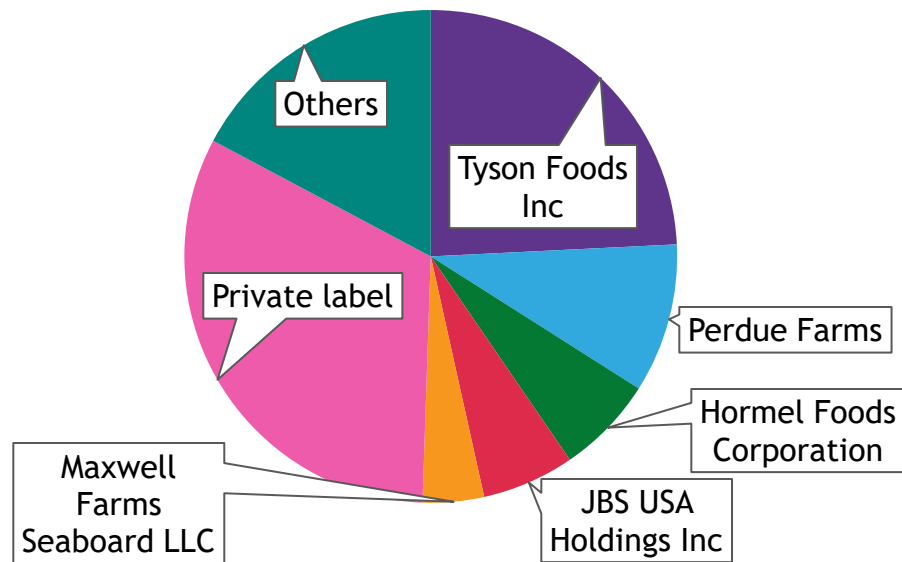
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Today's presentation

- First, a look at the basics: market data, product introductions
- Then, trends we see in the market: product trends and consumer behavior
- A few final thoughts

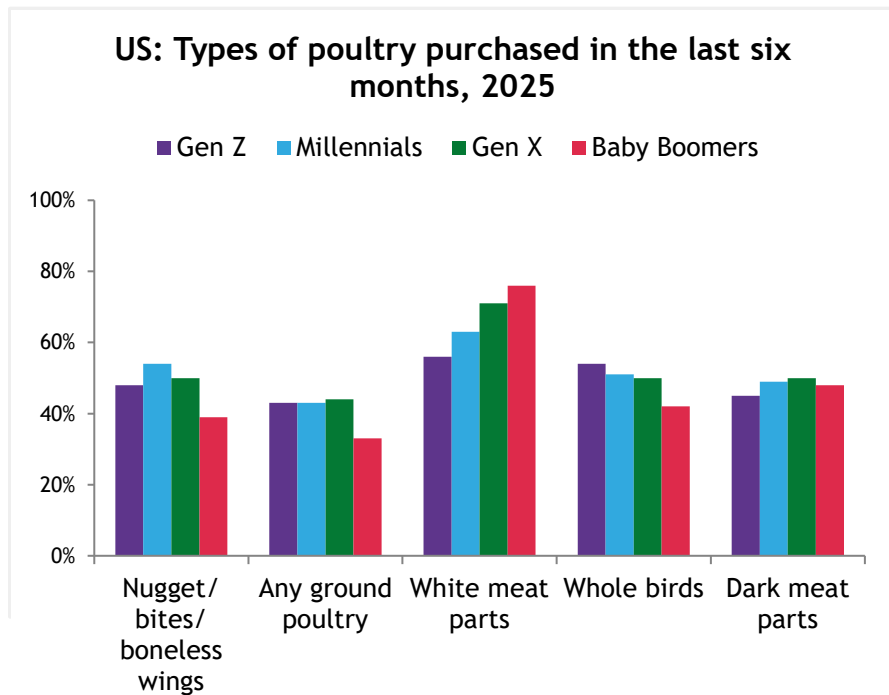
Poultry category sales continue strong

US: Sales of poultry products, 52 weeks ended April 20, 2025



Circana shows sales for 52 weeks ended April 20, 2025, for all types of poultry products at just over \$12bn. Tyson, the market leader, accounts for about 15%, but note that all private label is about 20% of the total.

(Almost) everyone eats poultry

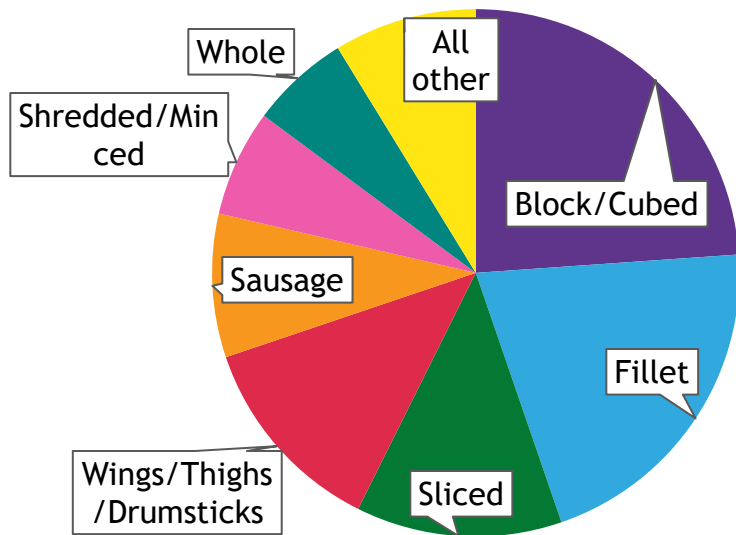


About 97% of consumers say they have purchased any kind of poultry product in the last six months.

White meat is most popular, followed by whole birds (e.g. rotisserie chicken). Younger consumers, and those with families are most likely to choose those whole birds or nuggets.

Nuggets rule new product introductions

US: Poultry new product introductions by format, 2020-2024



A few interesting changes over time:

- Block/Cubed (think chicken nuggets) steady over time
- Sliced (mostly lunchmeat) shows declines
- Wings/Thighs/Drums show increases, mostly flavored
- Whole birds steady over time; mostly rotisserie chicken

A few examples of product formats



Seasoned, ready to cook skewers

Gold Rush Chicken Skewers

Uncooked chicken thigh skewers for the skillet or grill (US).



Wings

Pilgrim's Korean BBQ Style

Chicken Wings

Chicken wing sections with Korean BBQ style rub are fully cooked and ready to heat and eat (US).



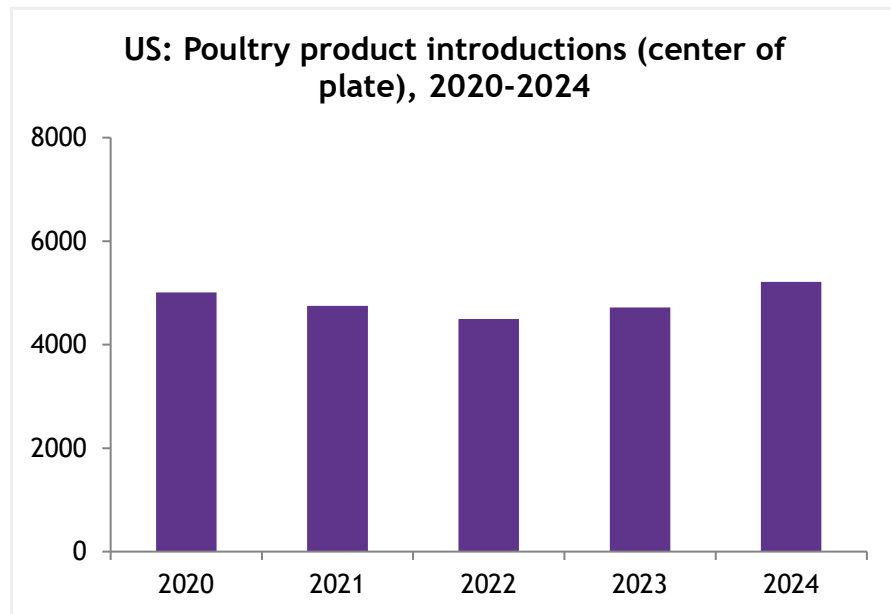
Burgers

Member's Mark Tex Mex Style

Chicken Burger

Chicken-based burgers also contain cheddar cheese, roasted corn and jalapeño peppers (US).

Poultry product innovation is up



Despite market forces negatively impacting poultry production, the number of new product introductions has shown increases over the last five years.

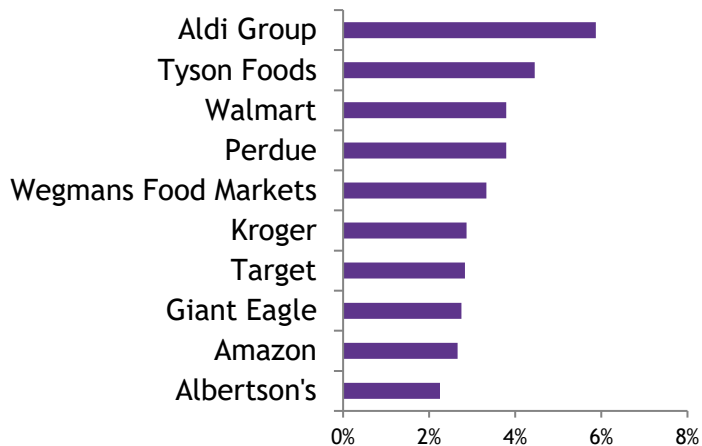
This data includes all types of poultry, intended as center-of-the-plate items (so, excludes poultry used in prepared meals). Of the number of products shown, more than 80% is chicken.

Poultry, mainly chicken, appears in increasing numbers in prepared meals, hot snacks, pizza, and meat snacks.

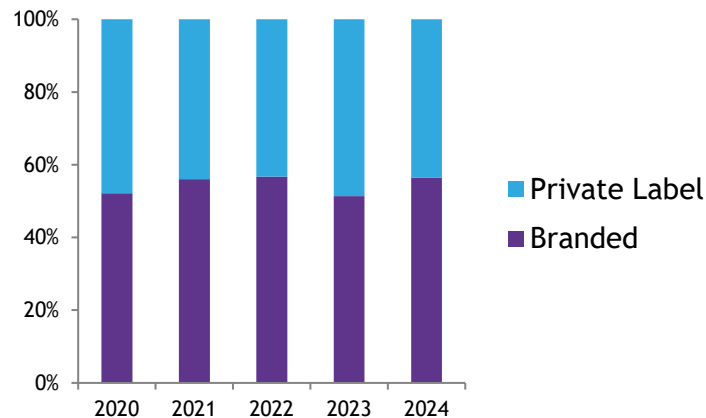
Private label accounts for half of introductions

Of the 10 most active companies (in terms of new products), eight of them are retailers.

US: Most active companies, poultry introductions, 2020-2024



US: New poultry product introductions, by branded and private label



Innovation appears from brands and retailers



Perdue
Perdue Rice Breaded Chicken
Breast & Vegetable Tenders
Chicken plus vegetables in one
nugget (US).



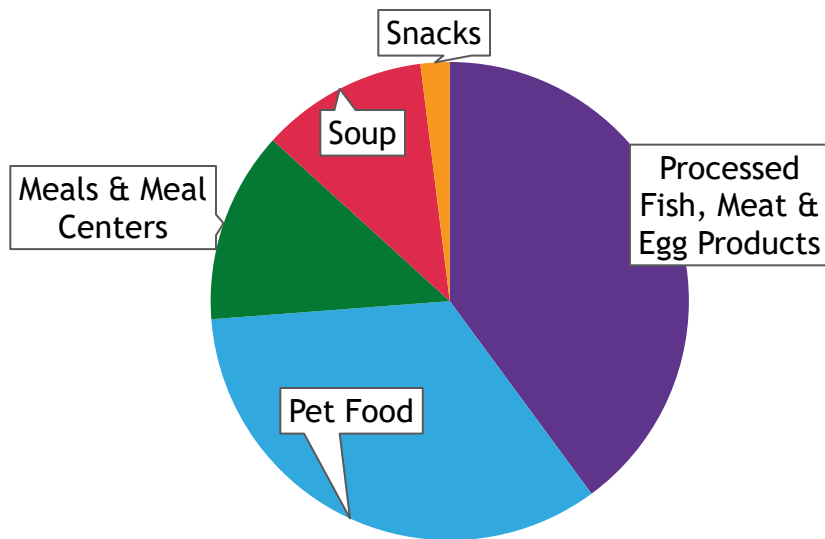
Aldi
Aldi Whole Grain Chicken Fries
Chicken breast fritters shaped
like friess (US).



Tyson
Tyson Al Pastor Style Chicken
Bites Uncooked seasoned
chicken breast pieces (US).

Chicken is everywhere (almost)

US: Chicken as a main component across selected product categories, 2020-July 2025



While the processed meat category is the one with the greatest number of chicken products, we also see introductions in meals, soup, snacks, and pet food.

Chicken is everywhere (almost)



Meals

Healthy Choice Simply Steamers Chicken Fried Rice With the company's On Track branding, indicating it is GLP-1 friendly with both protein and fiber (US).



Snacks

Wilde Sea Salt & Vinegar Protein Chips Protein in the chips comes from chicken (first ingredient) and egg whites (US).



Pet food

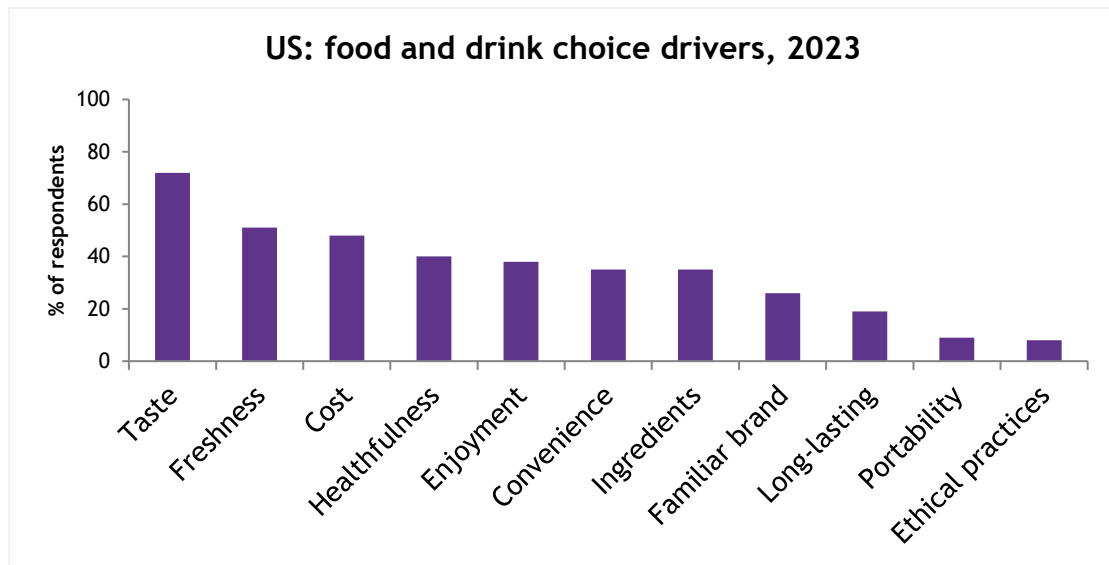
Target Kindful Grilled Chicken Flavor Paté Wet Dog Food Chicken meat, chicken broth, and chicken liver tare the first three ingredients (US).

A closer look at a few key trends that impact chicken innovation

Taste is most important, but other factors influence purchase

Taste is always #1, but all the factors work together to inform consumer choice. Note that "enjoyment" is a broader term, encompassing taste, health, and the overall experience.

Let's look at Cost (value), Health, Convenience, Taste (which is often all about indulgence).



Base: 1,847 internet users aged 18+ who are responsible for food and drink shopping in household

Source: Kantar Profiles/Mintel, December 2023

Value



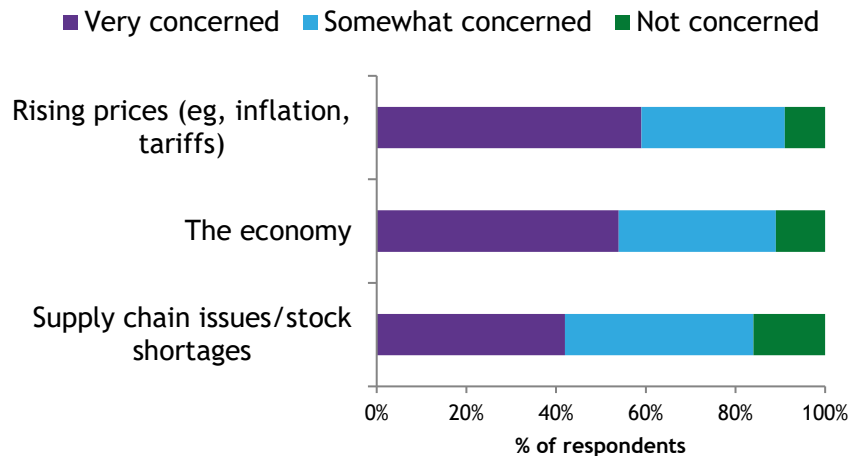
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Tariffs spark price increase concern

If enacted, the tariffs announced by President Trump are likely to raise prices and supply chain issues across the food industry. In addition, the fluctuating nature of the extent of the tariffs have consumers concerned.

This concern will translate into possible trade-offs on purchases, which will impact chicken.

US: level of concern about select economic and current issues, 2025



Base: 2,000 internet users aged 18+

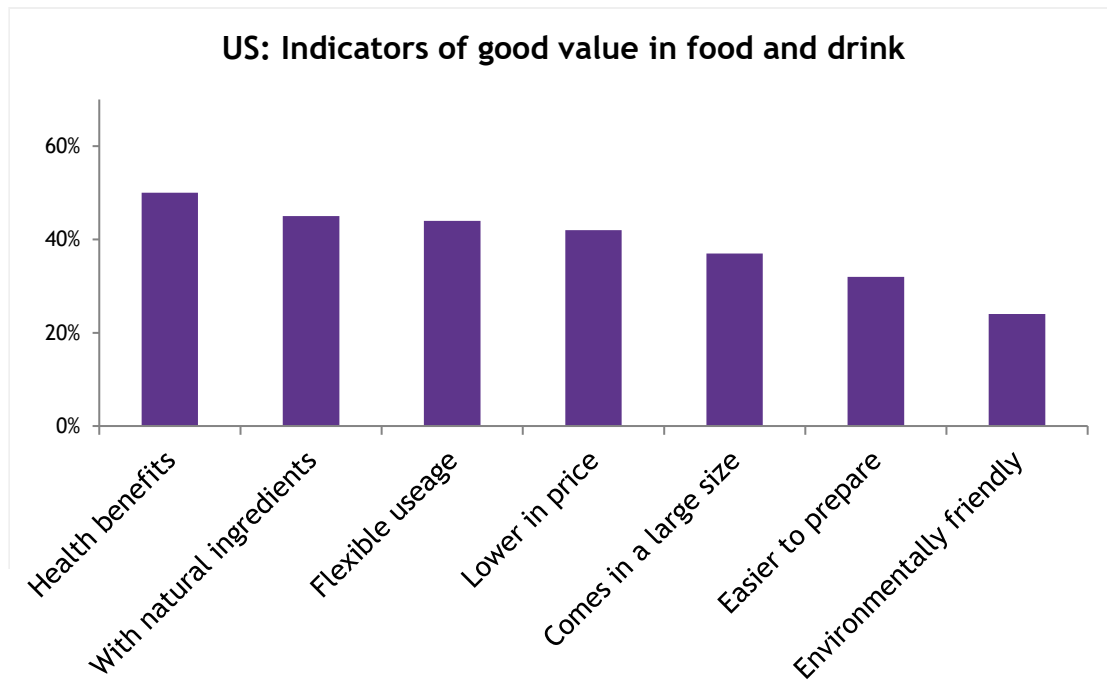
Source: [Mintel](#), April 10-20, 2025

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However, "value" is far more than low price

Many factors contribute to perceptions of value.

In addition, half of consumers say they would pay more for products from a trusted brand or that are high quality.



Fieldwork: US - September 2023

Base: 1,000 internet users aged 18+

Source: US - Kantar Profiles/Mintel

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Walmart bettergoods embrace affordability

46% of consumers would purchase more value-added proteins if they were more affordable. Walmart's bettergoods features many items under \$5.



bettergoods

Gluten Free Chicken Tenders are fully cooked and gluten free for all-family enjoyment and speed of prep.



bettergoods

Chicken & Maple Breakfast Sausage Patties tap into consumer interest in classic maple flavors for breakfast.



bettergoods

Chicken Wings with Garlic Butter Dry Rub offer bold flavors with less mess.

Companies find ways to bundle benefits together



Fully Cooked Chicken Tinga,
from HEB



ConAgra's Dolly Parton's
Chicken & Dumplings

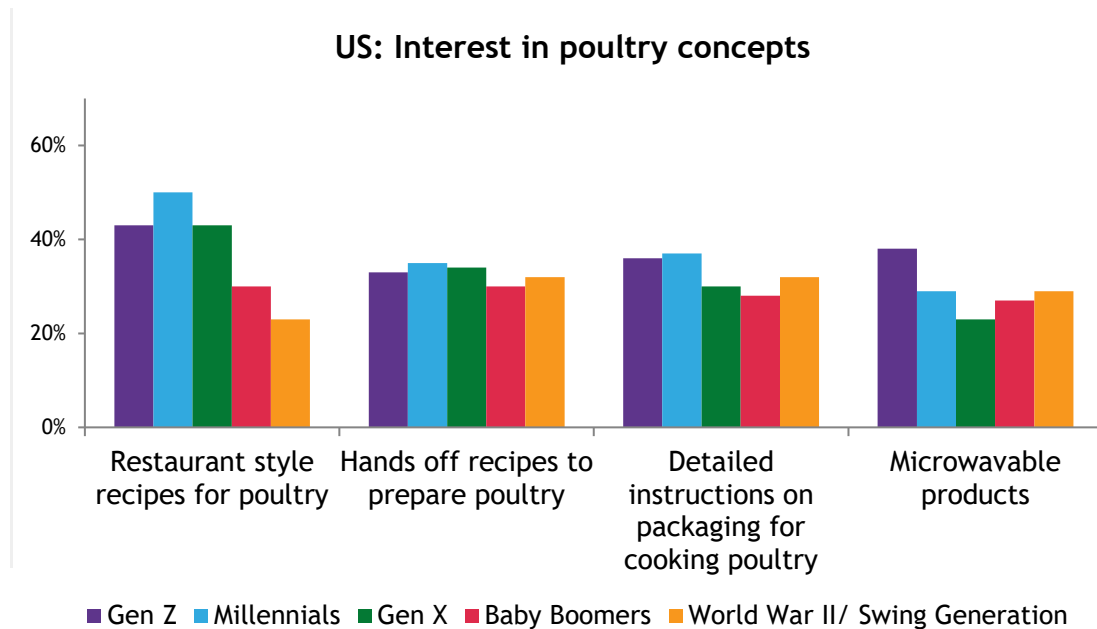
"Value" is many things. Low price is more important than ever (if possible), but when it is not, brands should communicate what ELSE about the product delivers benefits. Benefits can be the ease and simplicity of a heat-and-eat meal, or unique flavor profiles not easily created at home.

Convenience



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Convenience means making it easy to prepare



Those consumers who are most time-pressed (e.g. those with younger families) look for convenient, easy solutions, often with a bit of an upscale twist.

Fieldwork: February 2023

Base: 1,938 internet users aged 18+ who consumed poultry in the last 6 months

Source: Kantar Profiles/Mintel

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Fast, easy prep rules

More products appear on the market with specific instructions for air fryer cooking, yielding a crunchy, crispy product.

Other products attempt to mimic restaurant or take-out options (more quickly and less expensively).



Spicy Crispy Chicken Mega Fillets



Shanghai Inspired Noodles with Chicken & Vegetables Meal Kit

Another way to deliver value: Family-size products

Private label notched a solid share increase in multi-serve frozen meals, adding to a gain a year earlier and consistent with the segment's general value-for-the-money orientation. Similarly, brands offered consumers economical price-per-ounce family meals or main entrees, such as the one from Kevin's.



Sweet Sesame Ginger Chicken Skillet (Aldi)



Teriyaki-Style Chicken

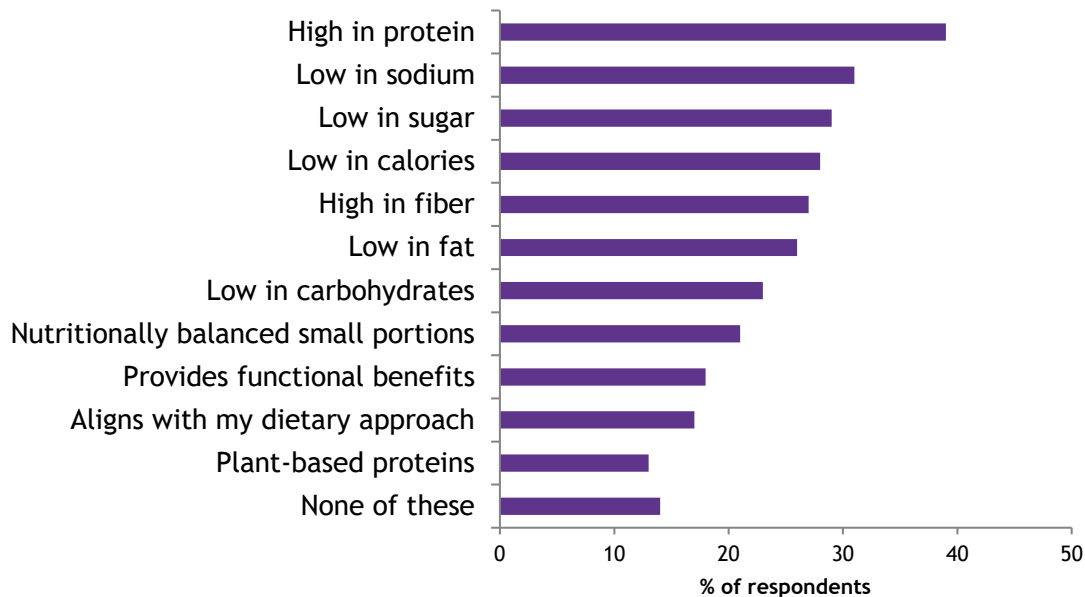
Health



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Protein is key, but just part of the definition of "healthy"

US: prepared meal health factors, 2025



As expected, meals should deliver protein; this requirement mirroring the dynamic in the broader food and drink market. Consumers take a holistic view regarding wellness, focusing not only on what should be included but also what shouldn't. Clean labels and quality ingredients are also essential.

Base: 1,746 internet users aged 18+ who have eaten packaged prepared meals or side dish in the past three months

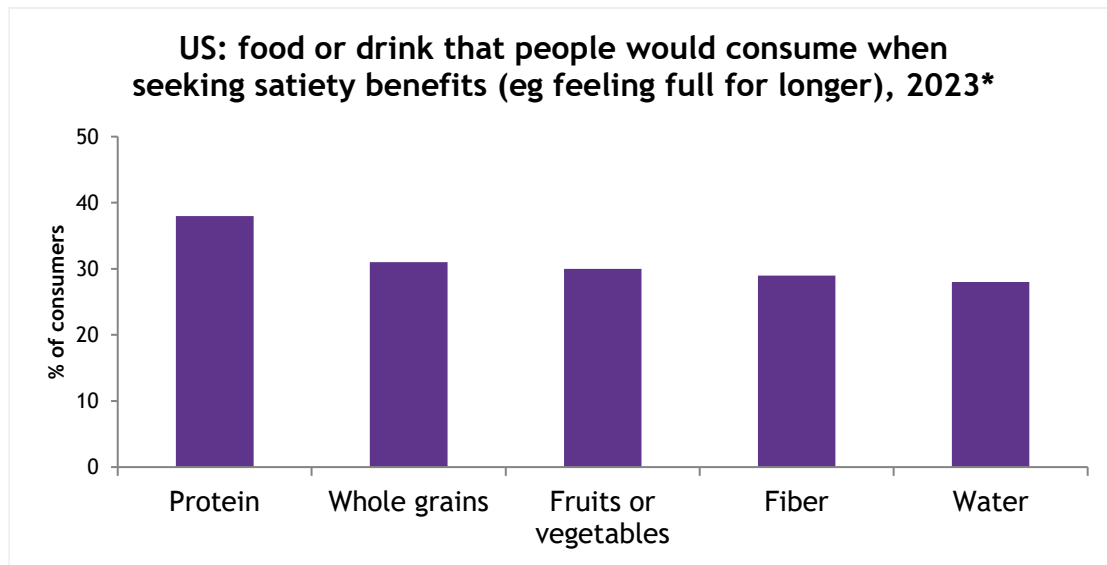
Source: [Mintel](#), April 2025

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GLP-1 medications renew the appeal of satiety claims

Users of GLP-1 medications report eating smaller portions and feeling full for longer. The drugs address a common issue when managing weight as 58% of US adults who are currently managing their weight struggle to feel satisfied after meals when managing their weight.

This creates an opportunity for food and drink that can help people eat less and feel satiety benefits even when they are not taking GLP-1 medication.



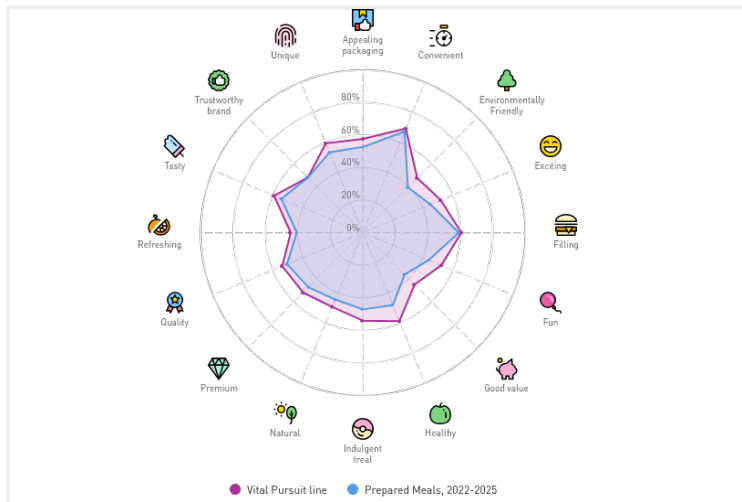
Base: US: 1,000 internet users aged 18+

Source: Kantar Profiles/Mintel, March 2023

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Nestle's Vital Pursuit has potential for broader appeal

A nutrient profile anchored by protein and fiber and tasty menu choices make it attractive to a general audience, who give it high marks on health, taste, quality and value.



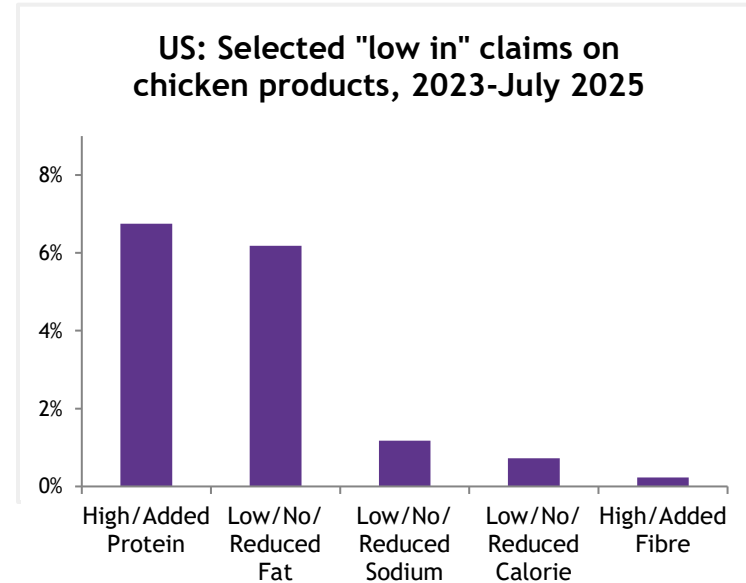
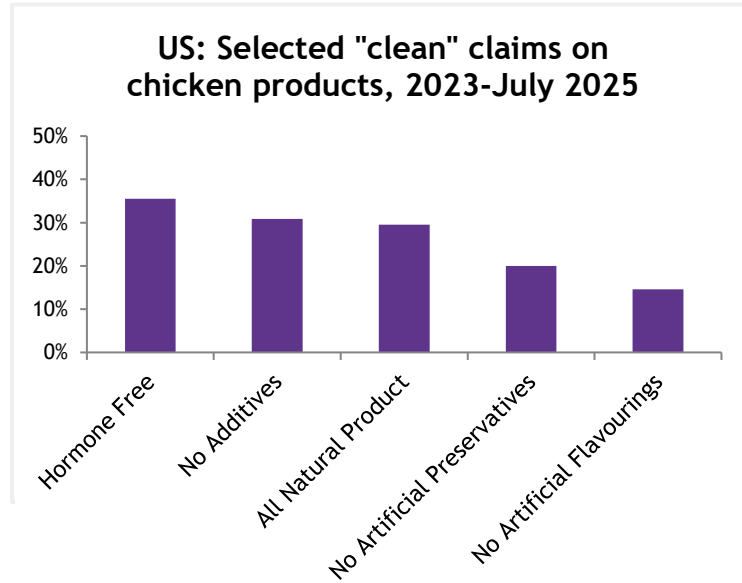
Vital Pursuit is rated higher across almost all attributes, significant for a new brand.



Grilled Chicken Chipotle Bowl, highest rated of the line's varieties.

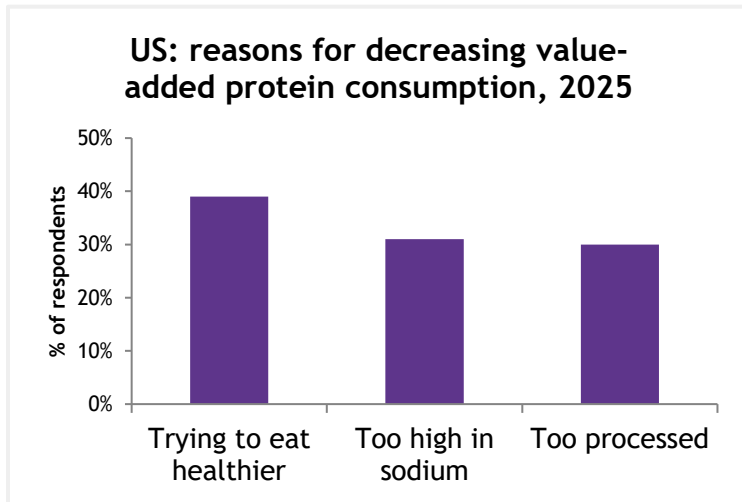
"Clean" claims lead on chicken products

"Naturalness" most commonly claimed on chicken products; other claims appear in quite small numbers.



Look beyond protein and fiber to optimize healthy offerings

Value-added proteins can attract the health conscious by promoting minimal processing, "positive nutrition," and easily understood ingredients.



Sam's Club Member's Mark Chicken Al Pastor,
with no artificial colors or flavors

Base: 263 internet users aged 18+ who are eating less value added proteins compared to a year ago

Source: Kantar Profiles/Mintel, January 2025

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Indulgence

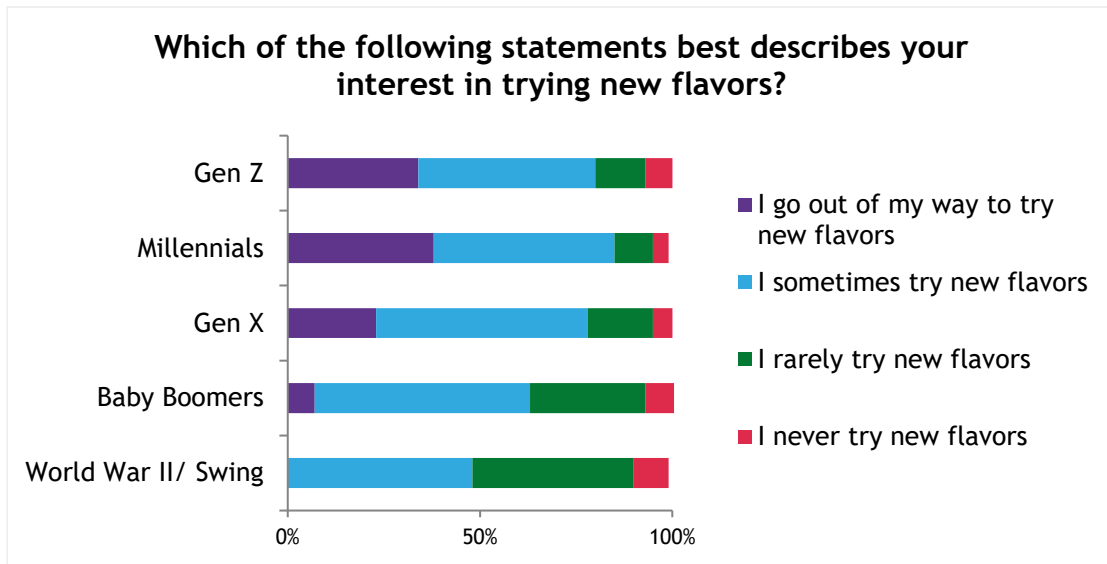


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Indulgence can mean flavor exploration, which is for the young

Not surprisingly, it is younger consumers who are more experimental, and older consumers who are less experimental.

What it means for poultry:
Room for value-added global flavors in prepared products; tie-ins with authentic global seasoning brands.



Fieldwork: November 2023

Base: 2,000 internet users aged 18+

Source: Kantar Profiles/Mintel

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Cross-category inspiration helps consumers experiment successfully



Artisan Crafted Pierogi
Inspired Fresh Pork Sausage
with Cheddar and Potato

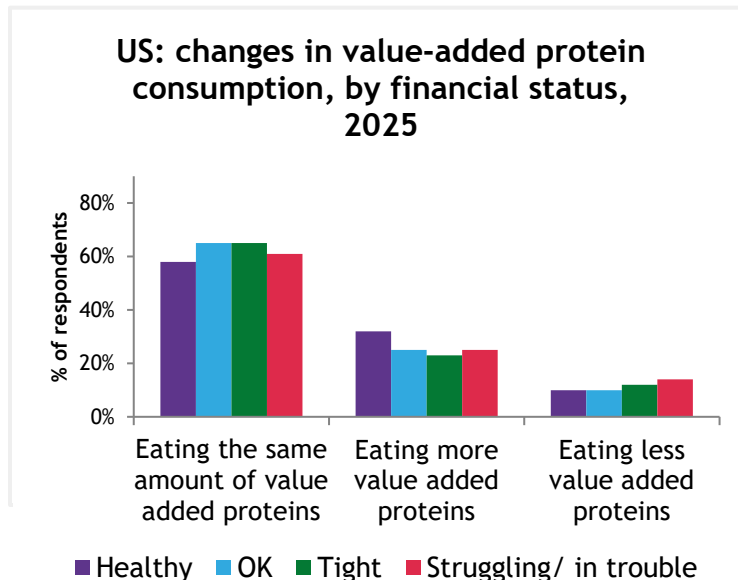
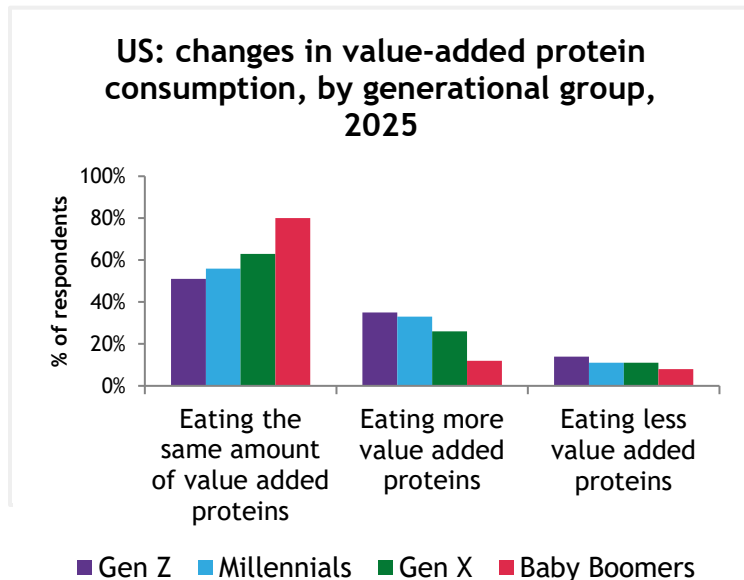


Fajita Style Raw Stuffed
Chicken Breasts

Combining familiar concepts in fresh ways can appeal to interests in novelty and global inspiration without totally reinventing the wheel.

Value-added proteins prized by younger consumers

Younger consumers and those who are more financially comfortable lead increases. Note that 80% of Baby Boomers are maintaining, as are consumers across the financial spectrum.



Base: 1,507 internet users aged 18+ who have purchased value added proteins in the past six months

Source: Kantar Profiles/Mintel, January 2025

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Chef-elevated products drive home indulgence

33% of consumers eating more value-added proteins compared to a year ago are doing so because they taste better than what they could make at home. Watch for this trend to expand as financial concerns may drive more at-home meals.



Spicy Ginger Chicken is inspired by contemporary chef David Tsang.



Sous Vide Creamy Chicken with Mushrooms is just like the dishes made in firm's New York City shop.

Familiar formats, reimagined, create flexible products



Cheesy Jalapeño Loaded
Nuggets



Chicken Pot Pie Loaded
Nuggets

Leveraging the familiarity of beloved formats, like chicken nuggets, with bold indulgent flavors takes this nostalgic classic to a new level. Consider the versatility of snackable formats, too.

A few final thoughts



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A few final thoughts

Consumers embrace chicken

Despite some challenging market conditions, poultry of all types (especially chicken) has a place in almost every home.

"Health" is protein, and more

Discussion of health values is essential in this category, but while the discussion must include protein, it means more.

But don't forget enjoyment

It's food, it's supposed to be fun, comforting, and enjoyable. Consumers are still willing to splurge.

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Experts in what consumers want and why

Get in touch!



Lynn Dornblaser
Client Advisor, Mintel Solutions
Lynnd@mintel.com

